Top 10 RFP Do's and Don'ts

Proactively and Positively Affect the Quality of Your Responses

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Objectives

- **Proactively limit Q&A**
- **Increase the quality of submissions**
- **Create more objective evaluation**

RFP, ITB, RFQ, RFWHO?

This applies to all variations

- RFP (Request for Proposals)
- ITB (Invitation to Bid)
- RFQ (Request for Qualifications)
- And other variations of these "solicitations"

Begins with preemptive discussions with procurement/purchasing

Top 10 Do's & Don'ts

1. Requirements
2. Pricing
3. Format & Structure
4. Minimum Qualifications
5. Scope of Work
6. Evaluation Criteria & Timeline
7. References
8. Vague & Repetitive Questions
9. Contract Exceptions & Negotiations
10. Coverage & Program Details

1. Requirements

Do have a list of must haves!

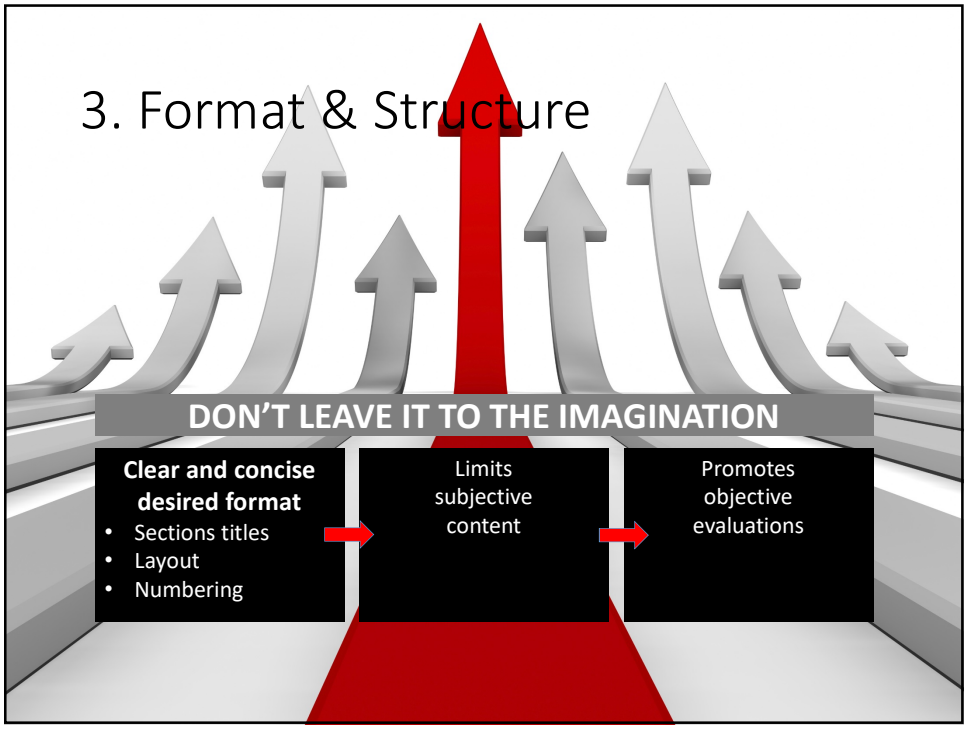
- What will cause a bidder to be deemed "non-responsive"?
- Provide a checklist if possible
- This can include DBE/MWBE requirements
- Includes forms
  - How must they be signed?
  - Are they provided in the RFP or via link?
  - Must they be provided in the response or prior to contract execution?

2. Pricing

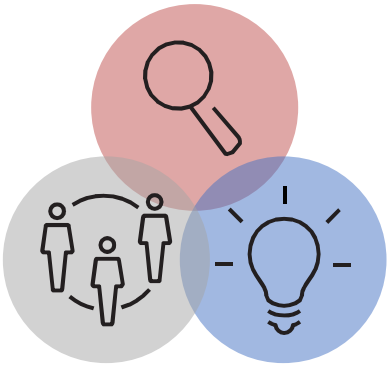
Do specify the scope/items to be priced!

- All items being priced should be what is presented in the scope
- If optional items are sought, include as a separate section
  - May eliminate or reduce the number of future solicitations for these services
- Clearly delineate between "capabilities" and "scope of work"

3. Format & Structure



4. Minimum Qualifications



Do list out the minimum qualifications of a bidder!

- General descriptions of firms, relevant experience and background
- Preferably in the beginning of the response

5. Scope of Work

Do specify how you want the SOW addressed in responses!

- Do you want confirmation?
- Do you want the bidder to respond to each item?
- Do you want a narrative description?
- Scope should be categorized… ie coverage, meetings, claims, risk control etc.
- Are there optional services you want included? – make sure it's addressed in pricing

6. Evaluation Criteria & Timeline

Do include the evaluation process and criteria!

- Is your evaluation criteria laid out clearly?
- Is scoring involved?
- Have you presented an anticipated timeline for each step of the process?

7. References

Don't broadly request references!

Is there a minimum needed?	What are the requirements of a reference?	Is there a format?	What information is required?
	• How recent? • Size & scope	• Open-ended • Forms	• Services • Contacts • Dates

8. Vague & Repetitive Questions/Directions

Don't be vague or repetitive!

Specificity is our friend!

- Do any of them ask for the same or similar information?
- Do any have multiple parts that should be split out?
- After procurement assembles the RFP, review for accuracy

9. Contract Exceptions & Negotiations

Don't forget to address the future contract!

- Is the contract or a sample contract provided?
- Exceptions and/or suggested revisions… acceptable?
  - If yes, must they be presented in the response?
  - If no, is that expressed clearly in the request (RFP)?
  - Is this shown in the requirements?

10. Coverage & Program Details

Don't think that a SOW and instructions are enough!

Keep in mind:

- What information have you provided about your program?
- Is the information sufficient for bidders to provide strong detailed responses?
- What will potential bidders request during the Q&A?

In Conclusion

- **Mindset** – What am I expecting in terms of responses received?
- The responses received should be similar in format and structure to aid in objectivity and ease of evaluation
- Proactively limit Q&A by providing clear concise information and directions
- The information needed to respond should be provided in the initial solicitation release… BUT they'll probably still ask for more
- Engage procurement/purchasing with ample time to revise the RFP as needed

QUESTIONS?

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